

France  
March | April 2016

**DBCI**

The pulse of the Digital Signage  
and DooH industry



Digital Signage & DooH  
Business Climate Index

Cooperation Partner France



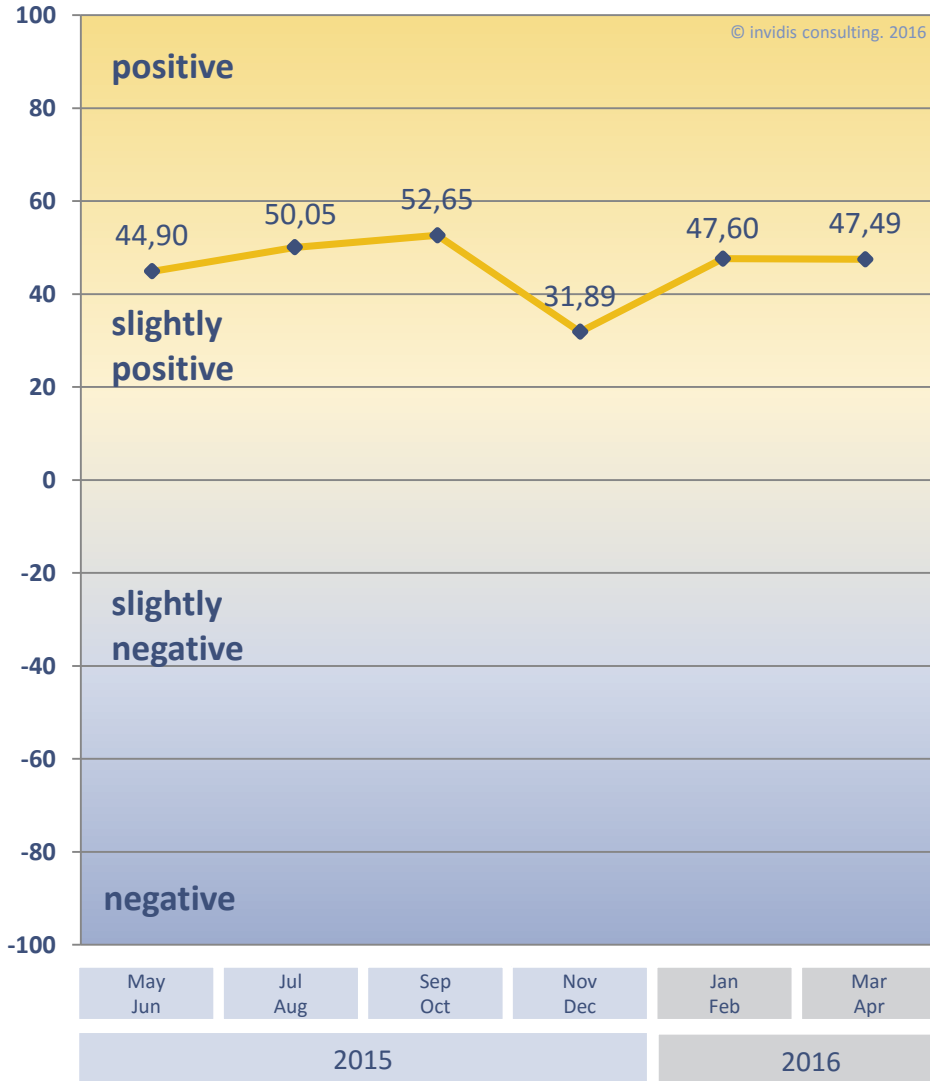
**DIGITAL SIGNAGE  
SUMMIT EUROPE**

23-24 June 2016, Munich, Germany

invidis research  
2016 FR 200



## Positive sentiment in the French Digital Signage market



- The Digital Signage Business Climate Index remained almost flat with a minor nominal decline by 1,11 base points from 47,60 points to 47,49 base points in March.
- The current business situation is rated slightly more conservative by the market participants - with negative ratings increasing by an additional 7%.
- The optimism for the near future is very high. It saw positive growth and now 70% of the polled companies are expecting a *more favourable* situation for their products and services in the summer.
- Still the Index is down by 20% compared to the same period in the previous year.
- The three most important markets for the industry in 2015 were Retail, Corporate Communications and Shopping Malls.



Participants: n=20; Region: FR; Survey Period: 2016 calendar weeks 11-12

# Robust current business situation & markedly increased outlook

Current business Situation | France | March/April 2016

Expectations | France | March/April 2016

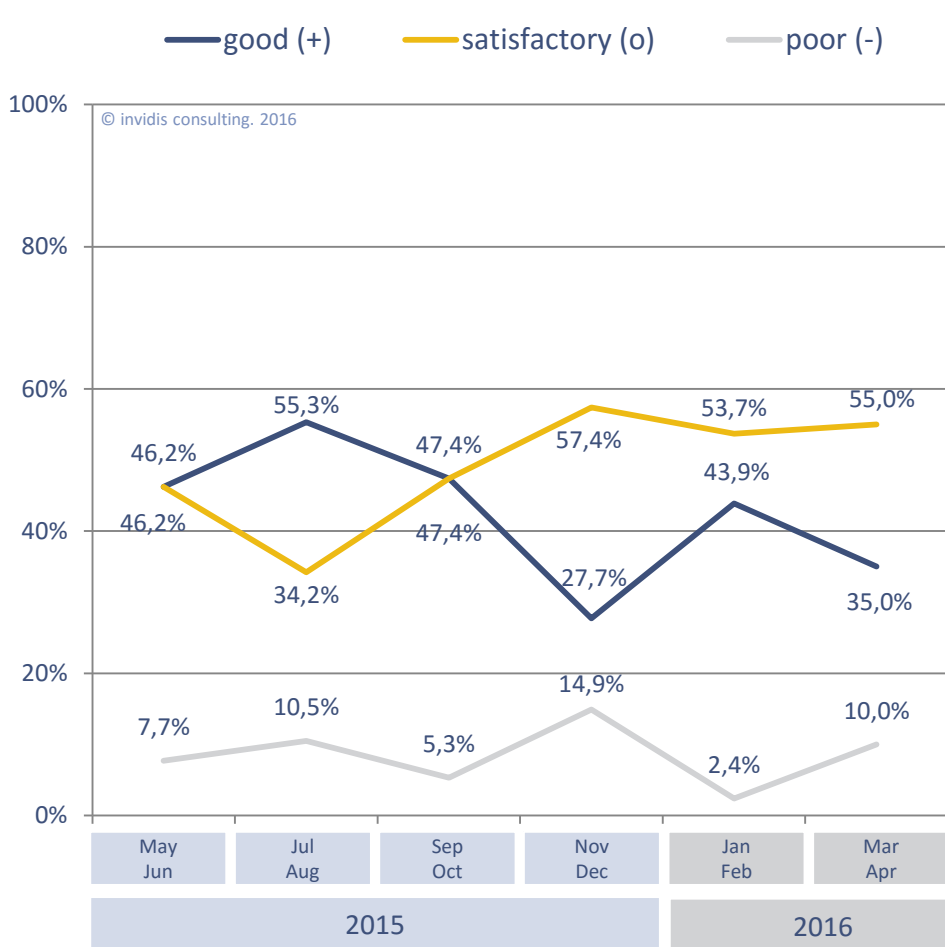


Fig. 2: DBCI France March | April 2016 „Business Situation“ rolling 12 months, n=20

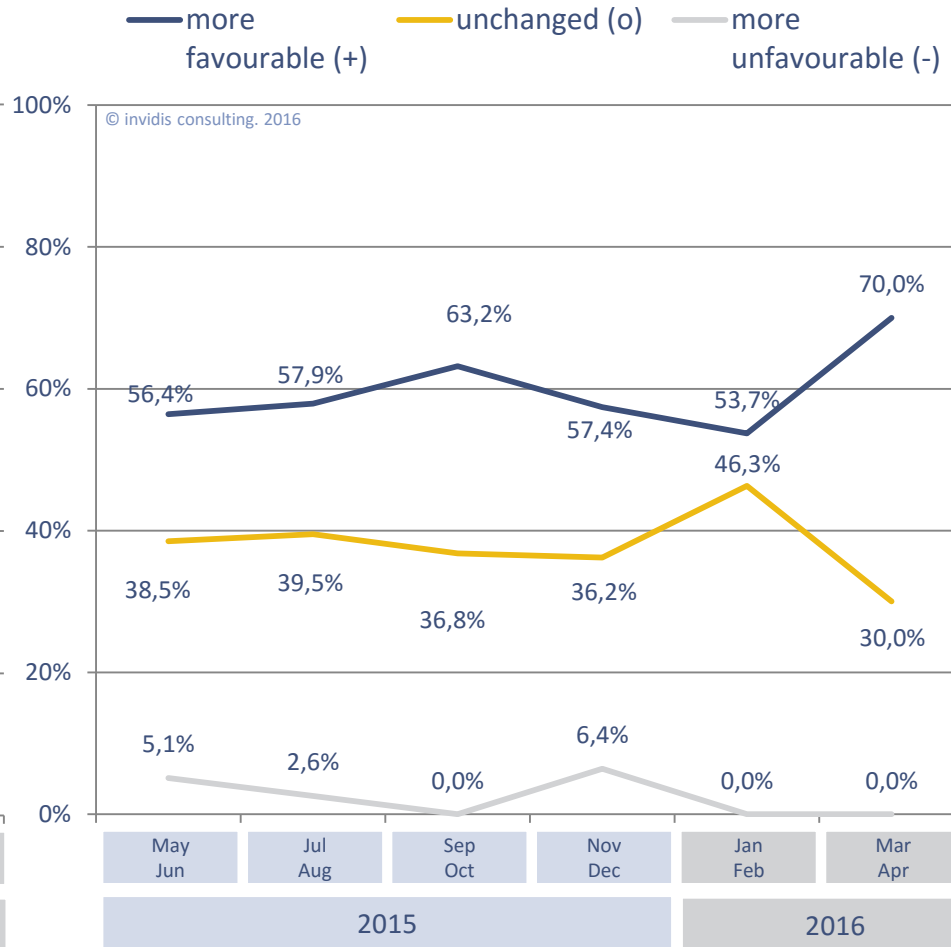


Fig. 3: DBCI France March | April 2016 „Expectations“ rolling 12 months, n=20

# Retail defends top spot, strong demand for Corporate Communications

**Question:** We would like to assess the dynamic for Digital Signage in the different vertical markets. In which vertical markets has your company realised the most projects in 2015? Please rate the Top 3 vertical markets.

- Retail is with approximately one third of all Digital Signage revenues the biggest vertical market. Customer engagement, marketing and ambient installations become more and more common not only in most high-street retailers, but also in small and medium businesses.
- The corporate communication vertical market has grown exponentially over the last few years. The digitization of employee communications is now seen as a sustainable investment by many companies.
- Shopping Malls is the third biggest vertical market. Since new shopping malls are being equipped regularly with Digital Signage solutions, not only for the retail outlets, but also for information, wayguiding and marketing by the mall operator, consistent revenues can be generated here.

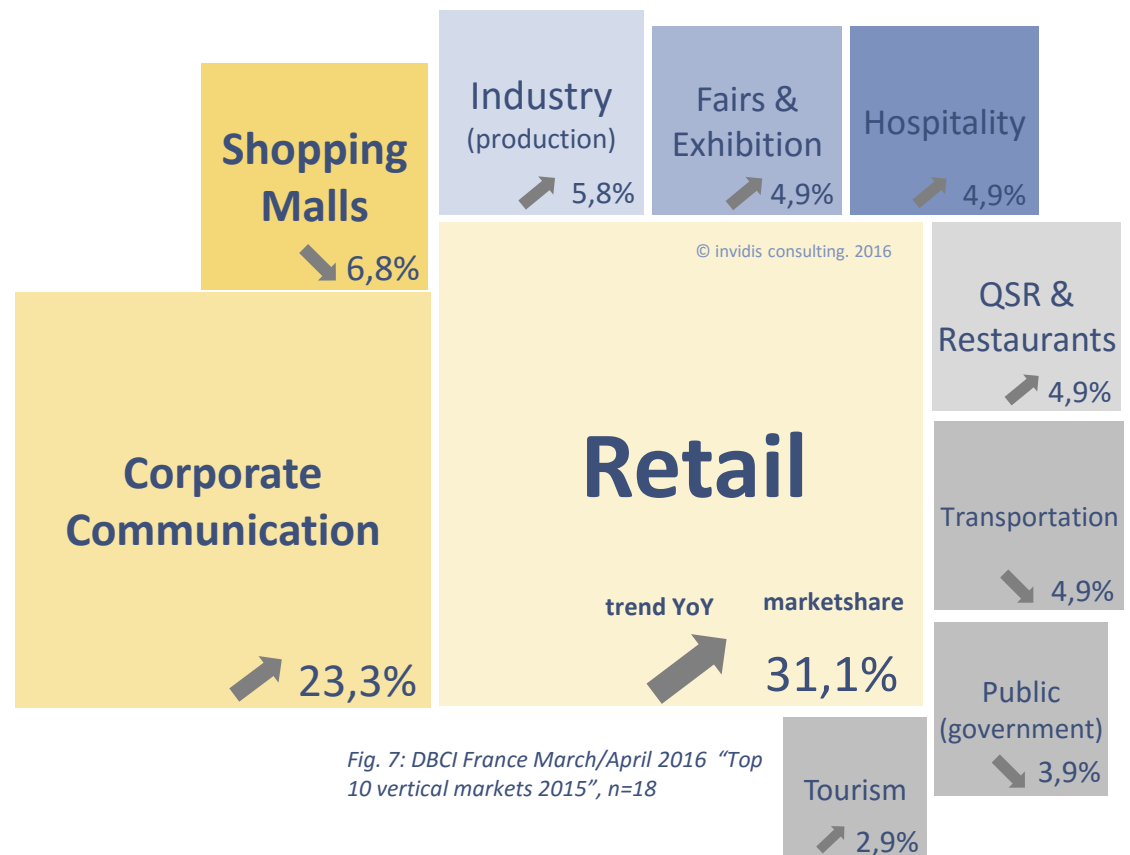


Fig. 7: DBCI France March/April 2016 "Top 10 vertical markets 2015", n=18

# France Cross-media bundling, network expansion & new installations will drive DooH

**Question:** Which factors will primarily lead to an increasing market share of DooH?

- The market participants think that a mix of three different approaches will lead to success for the Digital out of Home Media in the future.
- The main drivers for DooH will be cross-media bundling for dynamic campaigns i.e. online video, the expansion of existing networks and the roll out of new networks. For each option about one third of all polled companies have voted.
- Investments in existing networks are increasingly shifted from installing new locations or displays to upgrading the existing technology (hardware / software).
- The industry also sees potential for DooH networks in previously undeveloped locations. New technological developments like high brightness displays open up a host of prime positions.

Reasons for future DooH growth

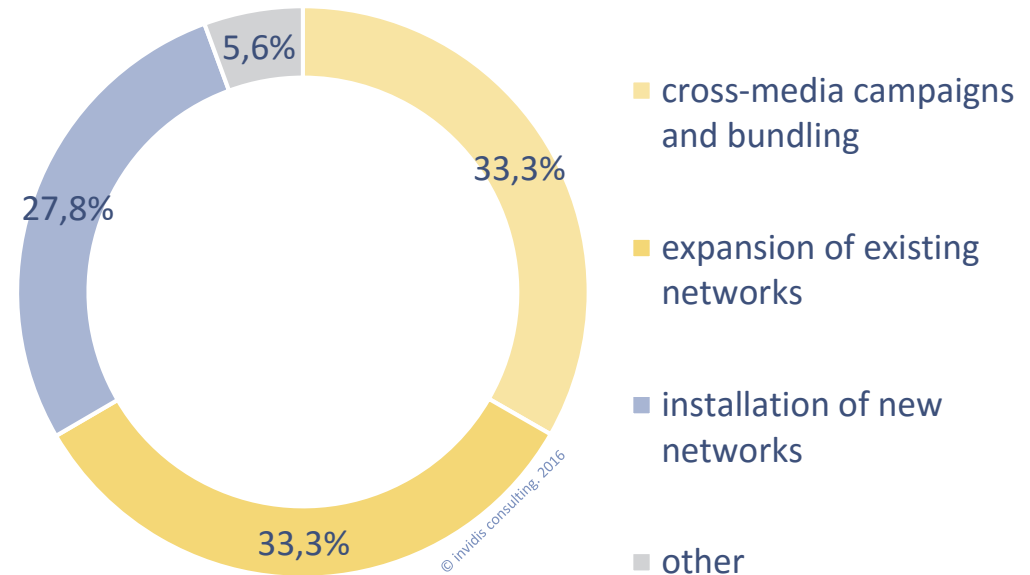


Fig. 8: DBCI France March | April 2016 "growth reasons DooH", n=18

## DBCI | Roadmap 2016 & Contact

2016	
January	
February	
March	
April	
May	← DBCI May./Jun.   WN22
June	
July	← DBCI Jul./Aug.   WN31
August	
September	← DBCI Sep./Oct.   WN40
October	
November	← DBCI Nov./Dec.   WN49
December	

### OVAB Europe will be rebranded as **Digital Signage Federation Europe** starting with the 1<sup>st</sup> April 2016

- The next survey will take place in calendar weeks 19-20
- The next planned publication will be in week 22
- The DBCI is polled by invidis consulting and published in cooperation with OVAB Europe
- If you are not yet part of the DBCI survey please contact us for further information
- The DBCI will be extended to other markets in 2016. For further information please contact Daniel Russell.

#### Contact

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 DSS | The Digital Signage Summit series

- «Digital Signage Summit» new brand for event series
- DSS is a dedicated confex event platform - conference and exhibition - featuring digital signage and DooH topics
- Each event features visionary and best practise presentations as well as panel discussions concerning the most recent state of the art projects, trends and drivers of the industry
- All events also have a dedicated exhibition space for product presentation and networking opportunities

